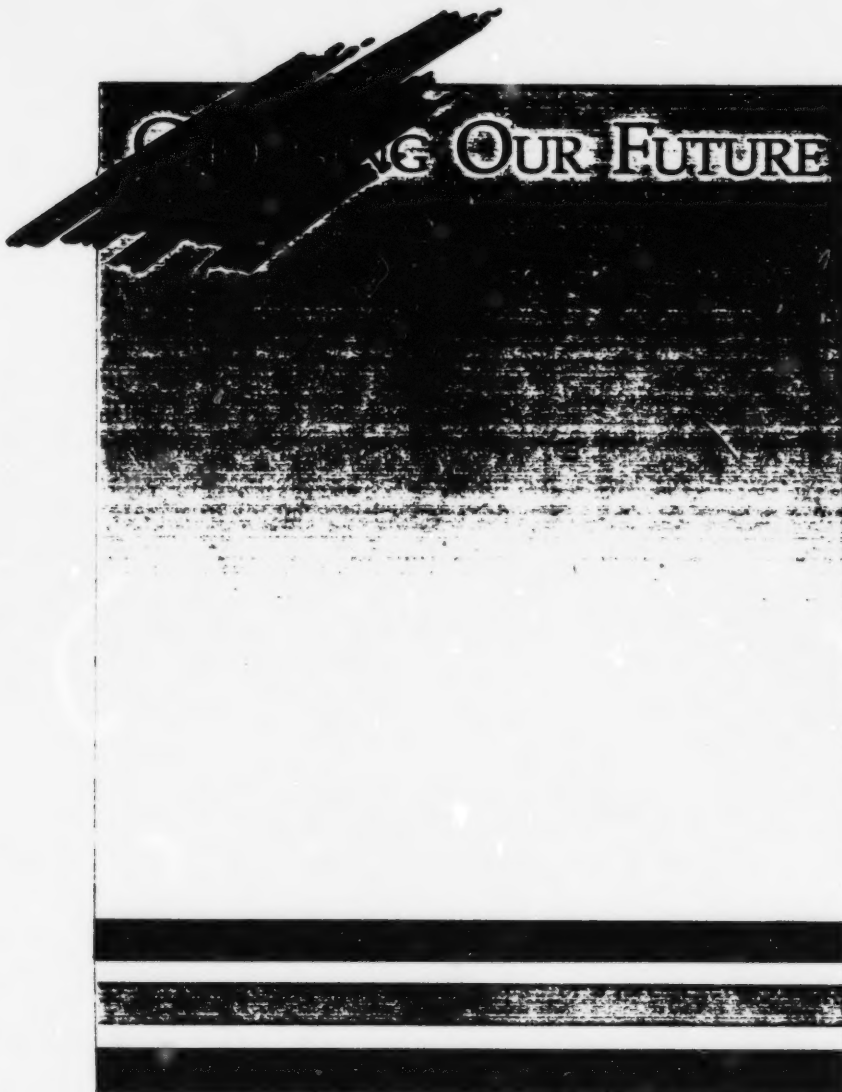




AN INVITATION TO REVITALIZE GREATER VANCOUVER'S LIVABLE REGION STRATEGY

Evaluation of Greater Vancouver's Land Supply

Greater Vancouver Regional District
April 1990

EVALUATION OF GREATER VANCOUVER'S LAND SUPPLY

PREPARED FOR:

THE GREATER VANCOUVER REGIONAL DISTRICT

CORIOLIS CONSULTING CORP.

MAY 1990

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1.0 INTRODUCTION

The Greater Vancouver Regional District is reviewing and updating its Livable Region Strategy. One important input to this update is a good understanding of the region's potential land supply and the rate at which it is being developed, so Coriolis Consulting Corp. was commissioned to evaluate the region's land supply.

This analysis focuses on the region's residential and industrial land supplies because these land uses account for most of the take-up of the region's vacant land supply and are, therefore, likely to be the two key land supply issues that must be addressed in the regional development strategy. Other types of land uses are discussed in more general terms.

The purposes of this report are:

- to provide an historical perspective on the region's land supply and rate of take-up.
- to estimate the total supply of vacant industrial land and to estimate the region's additional residential capacity.
- to estimate future rates of industrial and residential development.
- to compare the estimated rates of development with the estimated supply.
- to comment on the implications for regional development patterns and planning.

The analysis concentrates on the GVRD but also includes Fraser Valley municipalities.

2.0 APPROACH

2.1 RESIDENTIAL

To evaluate the region's residential land supplies, the following steps were followed:

1. Historical Review

- Information on the region's urban and residential land supplies and rates of development over the last 30 years was reviewed as a guide to future development trends and to compare the land supply situation that existed when the Livable Region Strategy was adopted (1975) with the land supply situation the region faces today.

2. Inventory

- All municipalities in the GVRD and the Fraser Valley were contacted and asked to provide the most current available information on their vacant residential land supply and/or their ability to accommodate additional residential development based on their existing Official Community Plans (or based on the Zoning Bylaw where no OCP is in effect).
- Most municipalities provided information about the additional number of housing units which could be accommodated under existing land use policies. Municipalities which are extensively developed have little remaining vacant land for residential use. Their ability to accommodate additional housing lies in redevelopment of existing residential areas at higher densities and in the conversion of other types of land uses to residential use. Therefore, additional unit capacity is a more informative statistic than vacant residential land acreage. Additional capacity estimates are provided on a short and long-term basis.

3. Rate of Development

- Data collected by Canada Mortgage and Housing Corporation for single and multi-family housing unit starts from 1979 to 1989 by municipality (Appendix A) were analyzed and utilized to estimate each sub-region's future annual take-up rate. These data are gross unit starts. In some built-up municipalities with little remaining vacant residential land, most housing units developed replace existing housing units (this is particularly true for single family units). In outlying municipalities most new housing development generally occurs on vacant land. Still other municipalities fall in between, with some new housing replacing existing units and some occurring on vacant land. There is no comprehensive analysis available of the percentage of gross residential unit starts which are net new units, so the take-up rates used in this report are offered as guidelines only.

4. Comparison of Supply and Rate of Development

- Based on additional unit capacity estimates and estimated take-up rates, the short term and long term supply implications are presented for each sub-region and for the region. As housing markets do not necessarily coincide with municipal boundaries, the emphasis of this supply-demand analysis is on sub-regions.

2.2 INDUSTRIAL

A similar process was followed in evaluating the region's industrial land supply. Municipalities in the GVRD and the Fraser Valley were asked to provide inventories of their vacant short term and long term industrially designated land. The entire GVRD's industrial land take-up rate was estimated based on information available from observers of the industrial real estate market and from historical take-up rates. The take-up rates for the Fraser Valley municipalities are estimates provided by the municipalities.

3.0 RESIDENTIAL LAND SITUATION IN GREATER VANCOUVER

3.1 HISTORICAL TRENDS

There is no comprehensive historical information available on the supply and take-up rate of residential capacity in the GVRD over the last 30 years or so. However, there is information available on the rate of conversion of rural land to urban uses.

In a 1982 report, the GVRD estimated that the region's developed urban area expanded by about 45,000 acres between 1961 and 1981 (average of about 2,200 acres per year).¹ While "urban area" is not specifically defined, it generally refers to lands developed for residential, commercial, institutional, and industrial uses. The 1982 study found that 67% of the urban acreage increase had occurred south of the Fraser River, 12% in the Northeast Sector, and 10% in each of the Burrard Peninsula and the North Shore.

As of 1981, the GVRD estimated that the region had about 46,000 vacant acres designated for urban use (residential, commercial, and some industrial uses) and about 4,800 acres in urban reserve (primarily for residential use) for a total of about 51,000 vacant acres. In addition, about 8,000 acres of vacant industrial land were identified.

Although there is no definitive evidence, the rate of conversion of rural land to urban use in the GVRD appears to have been declining over the last 30 years. Here are several reasons for this apparent decline:

- a larger share of total Lower Mainland development is occurring outside the GVRD.
- the multi-family share of total housing starts has increased, partly due to demographics, lifestyle preferences, and affordability.

¹ Greater Vancouver's Land Resource: Current Use and Land Supply, GVRD Planning Department, September 1982.

- planning and zoning tend to encourage more intensive use of land and economic pressures have also caused more intensive use.
- slower population growth during parts of the 1980s and slower economic growth.

However, the end of the 1980s and the start of the 1990s has been a buoyant period in the Lower Mainland, with increased population growth and economic development. The rate of land consumption is, therefore, likely to increase.

3.2 LIVABLE REGION STRATEGY

The Livable Region Strategy was adopted in 1975 by the GVRD, partly in response to concerns about the region's limited supply of land suitable for growth. It contained a five part strategy to manage and direct growth in the GVRD. Part One of the strategy related to residential development. It proposed residential growth targets for each part of the region based on several criteria (Table 1 shows the population growth targets).

To meet these targets, in-fill development of under-utilized land and redevelopment was encouraged in established urban areas. The strategy also recognized that the region would develop outwards into new residential areas, but compact housing was encouraged in these new areas to make better utilization of the region's land supply.

As Table 1 shows, the region's population did not grow as fast between 1976 and 1986 as the Livable Region Strategy anticipated and the targeted shares of population growth for the sub-regions did not achieve the target levels established. Richmond, Delta, Surrey-White Rock, and the North Shore received higher percentage shares of the region's growth than targeted. It seems, therefore, that overall demand for urban land between 1976 and 1986 was less than anticipated by the Livable Region Strategy. A large proportion of the growth which did occur was accommodated by taking up raw land in suburban areas rather than by increased densities in developed areas.

Table 1 also shows that between 1986 and 1989, Surrey-White Rock, Vancouver, and the Northeast Sector accommodated the largest shares of the GVRD's estimated population growth. While suburban municipalities have accommodated a large share of the region's recent population growth, the inner municipalities of Vancouver, Burnaby and New Westminster have also experienced substantial recent population growth.

TABLE 1: POPULATION TRENDS AND TARGETS 1976 - 1989

AREA	1976 CENSUS	% OF GVRD	1986 TARGET	% OF GVRD	TARGET (1) INCREASE 1976-1986	% OF GVRD	1986 CENSUS	% OF GVRD	ACTUAL INCREASE 1976-1986	% OF GVRD	1980 (2) ESTIMATE	% OF GVRD	ESTIMATED INCREASE 1986-89	% OF INCREASE 1986-89
VANCOUVER - U.E.L.	413,700	39.4%	489,500	33.1%	47,500	16.0%	434,753	34.5%	21,053	10.0%	451,778	33.4%	17,025	16.0%
BURNABY - NEW WEST.	169,992	16.2%	248,500	16.8%	54,500	18.4%	185,133	14.7%	15,141	7.2%	194,912	14.4%	9,779	10.3%
NORTH SHORE	100,815	9.6%	167,000	11.3%	21,500	7.2%	140,205	11.1%	39,590	18.9%	149,895	11.1%	9,480	10.0%
NORTHEAST SECTOR	91,039	8.7%	154,500	10.5%	51,000	17.2%	114,160	9.1%	23,121	11.0%	127,726	9.4%	13,586	14.3%
RICHMOND	80,034	7.6%	130,000	8.8%	43,000	14.5%	108,482	8.6%	28,458	13.6%	117,773	8.7%	9,281	9.8%
DELTA	64,482	6.1%	77,500	5.2%	9,500	3.2%	79,610	6.3%	15,118	7.2%	83,467	6.2%	3,857	4.1%
SURREY - WHITE ROCK	128,984	12.3%	209,200	14.2%	69,500	23.4%	195,834	15.5%	66,840	31.9%	227,404	16.8%	31,570	33.4%
GVRD SUB-DIVISION A	2,014	0.2%	1,600	0.1%	400	0.1%	2,499	0.2%	485	0.2%	n/a	n/a	n/a	n/a
TOTAL GVRD:	1,050,880	100%	1,477,800	100.0%	286,500	100.0%	1,260,986	100.0%	209,805	100.0%	1,262,746	100.0%	94,268	100.0%

NOTES:

(1) 1976 TO 1986 TARGET INCREASE WAS BASED ON POPULATION ESTIMATES FOR 1976
NOT ON THE 1976 CENSUS

(2) FOR COMPARATIVE PURPOSES, THESE ESTIMATES DO NOT INCLUDE THE CITY AND
TOWNSHIP OF LANGLEY.

SOURCE: "THE LIVABLE REGION 1976/86"
CENSUS 1976 & 1986
CENTRAL STATISTICS BUREAU, B. C. MUNICIPAL POPULATION ESTIMATES

3.3 THE CURRENT SITUATION

This section compares estimates of the region's additional housing capacity with estimated future take-up rates.

There are some qualifications to be noted in using this information.

All municipalities in the GVRD, plus Pitt Meadows, Maple Ridge, Mission, Matsqui, Abbotsford, and Chilliwack were asked to provide information on their potential additional supply of single family and multi-family housing units based on current municipal policies. Some municipalities have provided information based on saturation levels of development which are permitted under existing land use policies. These type of statistics may overstate the potential to accommodate residential development because landowners may not choose to develop their properties to these densities. Other municipalities have provided more realistic estimates of how many additional housing units they can probably accommodate. Still other municipalities do not have estimates of residual housing capacity and have instead provided housing unit projections up to a certain time period. These types of projections are usually more demand driven than based on potential supply. The result of these qualifications is that in a sense the analysis ends up comparing "apples and oranges" because the accuracy and sources of the housing capacity estimates varies by municipality. However, on a regional and sub-regional scale the information provides a good general picture of the region's ability to accommodate additional residential development.

3.3.1 Single Family Residential Capacity in the GVRD

Table 2 shows the GVRD's additional single family housing capacity in lot terms, plus estimated annual take-up rates. Pitt Meadows and Maple Ridge are included in the GVRD supply analysis because of their proximity to the GVRD.

TABLE 2: GREATER VANCOUVER REGIONAL DISTRICT - ADDITIONAL SINGLE FAMILY HOUSING CAPACITY, 1990

MUNICIPALITY	1990 ESTIMATED ADDITIONAL SINGLE FAMILY LOT CAPACITY (1)		ESTIMATED SF LOT TAKE-UP RATE PER YEAR (2)	IMPLICATIONS FOR THE SUB-REGIONS
	SHORT TERM	LONG TERM		
VANCOUVER	NA	0		THESE MUNICIPALITIES HAVE VERY LITTLE VACANT LAND REMAINING FOR NEW SINGLE FAMILY HOUSING.
BURNABY	NA	0		
NEW WESTMINSTER	NA	0		
SUB-REGION (3)	NA	200	410	
WEST VANCOUVER (4)	800	4,000		20 YEAR SUPPLY OF SHORT TERM LAND AND A 20 YEAR SUPPLY OF LONG TERM LAND (WEST VANCOUVER LONG TERM CAPACITY MAY INCLUDE SOME MULTI-FAMILY UNITS).
NORTH VANCOUVER CITY (5)	400	0		
NORTH VANCOUVER DISTRICT (6)	4,430	1,640		
SUB-REGION	5,630	5,640	280	
COQUITLAM (7)	4,950	10,000		8 YEAR SUPPLY OF SHORT TERM LAND AND A 10 YEAR LONG TERM SUPPLY.
PORT COQUITLAM (8)	1,600	1,000		
PORT MOODY (9)	3,000	0		
BELCARRA (10)	NA	50		
ANMORE (11)	NA	400		
SUB-REGION	9,550	11,450	1,180	
RICHMOND (12)	4,700	0		13 YEAR SUPPLY OF SHORT TERM LAND.
SUB-REGION	4,700	0	350	
DELTA (13)	4,300	0		5 YEAR SHORT TERM SUPPLY OF SINGLE FAMILY LOTS
SURREY (14)	14,600	NA		
WHITE ROCK (15)	0	0		
SUB-REGION	18,900	0	3,850	
LANGLEY CITY (16)	0	0		6 YEAR SHORT TERM SUPPLY AND 40 5 YEAR LONG TERM SUPPLY.
LANGLEY TOWNSHIP (17)	3,900	24,300		
SUB-REGION	3,900	24,300	690	
PITT MEADOWS (18)	120	1,190		3 YEAR SUPPLY OF SHORT TERM LAND AND A 24 YEAR SUPPLY OF LONG TERM LAND.
MAPLE RIDGE (19)	2,300	16,750		
SUB-REGION	2,420	17,940	750	
TOTAL GVRD (INCLUDES MAPLE RIDGE AND PITT MEADOWS)	45,100	59,530	7,230	THE REGION HAS ABOUT A 6 YEAR SUPPLY OF SINGLE FAMILY RESIDENTIAL LOTS AND A 8 YEAR SUPPLY OF LONG TERM SINGLE FAMILY LOTS. COMBINED, THIS IS A POTENTIAL SUPPLY OF ABOUT 14 YEARS.

NOTES & SOURCES:

- (1) SHORT TERM IS DEFINED AS LANDS WHICH ARE ZONED AND SERVICED OR WHICH COULD BE READILY REZONED AND SERVICED. LONG TERM IS DEFINED AS LANDS WHICH ARE DESIGNATED FOR RESIDENTIAL USE, BUT ARE GENERALLY NOT SERVICED. LONG TERM ALSO INCLUDES LARGE LOTS IN RURAL AREAS WHICH ARE GENERALLY NOT SERVICED.
- (2) BASED ON CANADA MORTGAGE AND HOUSING CORPORATION SINGLE FAMILY UNIT STARTS AVERAGED OVER 1979 TO 1989. IT IS ASSUMED THAT ONLY 20% OF GROSS STARTS IN VANCOUVER, BURNABY, AND NEW WESTMINSTER AND 50% OF GROSS STARTS ON THE NORTH SHORE AND IN RICHMOND ARE NET NEW UNITS.

- (3) THESE MUNICIPALITIES HAVE VERY LITTLE VACANT LAND REMAINING FOR SINGLE FAMILY HOUSING. MOST NEW SINGLE FAMILY UNITS REPLACE EXISTING SINGLE FAMILY UNITS. POSSIBLY ONLY 20% OF TOTAL SINGLE FAMILY UNIT STARTS IN THIS SUB-REGION (2,045 UNITS) ARE NET NEW STARTS.
- (4) AS OF 1987, IT WAS ESTIMATED THAT WEST VANCOUVER HAD POTENTIAL FOR 1,530 ADDITIONAL LOTS IN ITS DEVELOPED AREAS. IF THIS POTENTIAL IS ADJUSTED TO ACCOUNT FOR HOUSING STARTS SINCE 1987, THE DISTRICT HAS A CURRENT POTENTIAL FOR ABOUT 800 SINGLE FAMILY UNITS. IN ADDITION, THERE IS CAPACITY FOR ABOUT 3,000 TO 4,500 HOUSING UNITS NORTH OF THE UPPER LEVELS HIGHWAY, MOST OF WHICH ARE EXPECTED TO BE SINGLE FAMILY UNITS.
- (5) THE CITY OF NORTH VANCOUVER ESTIMATES THAT IT HAS CAPACITY FOR 400 ADDITIONAL SINGLE FAMILY UNITS.
- (6) BASED ON THE BACKGROUND REPORT FOR THE DISTRICT OFFICIAL PLAN (FUTURE POPULATION AND HOUSING GROWTH #2C, MARCH 1989), IT IS ESTIMATED THAT THE WESTERN PART OF THE DISTRICT CAN ACCOMMODATE AN ADDITIONAL 1,700 TO 2,700 HOUSING UNITS. IT IS ASSUMED THAT ABOUT 50% OF THESE UNITS WILL BE SINGLE FAMILY UNITS (AVERAGE OF 1,100 UNITS). IN THE EASTERN PART OF THE MUNICIPALITY THE SEYMOUR OCP HAD A TARGET OF 17,750 HOUSING UNITS. IF EXISTING SEYMOUR UNITS ARE SUBTRACTED FROM THIS TARGET (7,340 AS OF 1988), THERE IS POTENTIAL FOR ABOUT 10,410 ADDITIONAL UNITS IN SEYMOUR. HOWEVER, RECENT POLICY CHANGES HAVE RESULTED IN ABOUT 3,070 LESS POTENTIAL UNITS IN SEYMOUR. THIS LEAVES POTENTIAL FOR ABOUT 5,290 SHORT TERM UNITS IN SEYMOUR AND 2,050 LONG TERM (URBAN RESERVE) UNITS IN SEYMOUR. ACCORDING TO THE SEYMOUR OCP, 80% OF UNITS ARE TO BE GROUND-ORIENTED. THEREFORE, IT IS ESTIMATED THAT SEYMOUR HAS POTENTIAL FOR AN ADDITIONAL 4,232 SHORT TERM SINGLE FAMILY UNITS AND 1,640 LONG TERM SINGLE FAMILY UNITS. SUBTRACTING 1988 AND 1989 ESTIMATED SINGLE FAMILY STARTS (ABOUT 500) AND A RECENT POLICY CHANGE ELIMINATING 400 SMALL SINGLE FAMILY LOTS IN THE DISTRICT, YIELDS A CURRENT POTENTIAL SUPPLY OF ABOUT 4,432 SHORT TERM SINGLE FAMILY UNITS AND 1,640 LONG TERM SINGLE FAMILY UNITS.
- (7) THE DISTRICT OF COQUITLAM ESTIMATES IT HAS POTENTIAL ADDITIONAL CAPACITY FOR 395 SINGLE FAMILY UNITS, PLUS AN UNKNOWN AMOUNT OF INFILL POTENTIAL IN EXISTING DEVELOPED AREAS. IN ADDITION, THERE IS POTENTIAL FOR 4,550 SINGLE FAMILY LOTS IN NORTHWEST COQUITLAM. ONCE THIS AREA IS DEVELOPED, THERE ARE ABOUT 1,800 TO 2,500 ACRES IN THE NORTHEAST AREA WHICH COULD BE USED FOR MAINLY SINGLE FAMILY RESIDENTIAL DEVELOPMENT. ASSUMING THERE ARE ABOUT 2,000 ACRES IN THIS AREA AND A DENSITY OF 5 UNITS PER ACRE, THE NORTHEAST COULD YIELD ROUGHLY 10,000 SINGLE FAMILY LOTS.
- (8) THE CITY OF PORT COQUITLAM ESTIMATES THERE IS A POTENTIAL ADDITIONAL SUPPLY OF 1,000 SINGLE FAMILY UNITS IN THE RIVER WOOD AREA, 200 SINGLE FAMILY UNITS IN THE SOUTH SHAUGNESSY AREA, 250 IN CITADEL, AND 150 IN WESTVIEW. IN ADDITION, THERE IS A LONG TERM SUPPLY OF ABOUT 1,000 SINGLE FAMILY UNITS IN NORTH PORT COQUITLAM.
- (9) BASED ON THE CURRENT OCP (WHICH IS TO BE REVIEWED IN 1990), THERE IS AN ADDITIONAL POTENTIAL SUPPLY OF ABOUT 2,950 SINGLE FAMILY UNITS IN PORT MOODY.
- (10) BELCARRA ESTIMATES THAT IT CAN ACCOMMODATE ABOUT 55 ADDITIONAL SINGLE FAMILY UNITS.
- (11) ANMORE HAS ABOUT 400 ACRES OF NET DEVELOPABLE LAND DESIGNATED FOR RESIDENTIAL USE. AT A MINIMUM LOT SIZE OF 1 ACRE, ANMORE HAS POTENTIAL TO ACCOMMODATE 400 ADDITIONAL LOTS.
- (12) BASED ON RICHMOND'S OCP, THE PLANNING DEPARTMENT ESTIMATED IN 1989 THAT AN ADDITIONAL 2,510 SINGLE FAMILY UNITS COULD BE ACCOMMODATED BETWEEN 1990 AND 1994 AND 2,188 ADDITIONAL SINGLE FAMILY UNITS COULD BE ACCOMMODATED BETWEEN 1995 AND 1999 FOR A TOTAL POTENTIAL ADDITIONAL SUPPLY OF 4,698 SINGLE FAMILY UNITS.
- (13) BASED ON HOUSEHOLD PROJECTIONS PROVIDED BY THE DISTRICT OF DELTA, IT IS ESTIMATED THAT AN ADDITIONAL 4,319 SINGLE FAMILY HOUSING UNITS WILL BE DEVELOPED IN DELTA BETWEEN 1990 AND 2006. NO ESTIMATE OF DELTA'S SUPPLY CAPACITY UNDER THE CURRENT OCP IS AVAILABLE.

- (14) SURREY ESTIMATES THAT THERE WERE 3,240 ACRES OF VACANT LAND IN THE URBAN DESIGNATION IN DECEMBER 1989. BASED ON 4.5 UNITS PER ACRE, THIS LAND SUPPLY COULD YIELD ABOUT 14,580 LOTS. IT SHOULD BE NOTED THAT THE URBAN DESIGNATION PERMITS SINGLE FAMILY AND TOWNHOUSE RESIDENTIAL USES. SO NOT ALL OF THIS VACANT LAND WILL BE USED FOR SINGLE FAMILY UNITS. ALSO, THERE ARE NO ESTIMATES AVAILABLE FOR SINGLE FAMILY LOT POTENTIAL IN SURREY'S SUBURBAN DESIGNATION. THIS DESIGNATION PERMITS 0.5 TO 1.0 ACRE LOT SIZES AND MAKES UP ABOUT 23% (18,500 ACRES) OF SURREY'S LAND AREA.
- (15) WHITE ROCK HAS NO VACANT SINGLE FAMILY RESIDENTIAL LAND.
- (16) THE CITY OF LANGLEY HAS NO VACANT SINGLE FAMILY RESIDENTIAL LAND.
- (17) THE TOWNSHIP OF LANGLEY ESTIMATES THAT AS OF 1990, IT HAS A SHORT TERM POTENTIAL SUPPLY OF 3,889 SINGLE FAMILY UNITS AND A LONG TERM SUPPLY OF 24,341 SINGLE FAMILY UNITS.
- (18) AS OF NOVEMBER 1989, PITT MEADOWS ESTIMATES THAT IT HAS A POTENTIAL SHORT TERM SUPPLY OF 124 SINGLE FAMILY UNITS AND A POTENTIAL LONG TERM SUPPLY OF 588 SINGLE FAMILY UNITS.
- (19) MAPLE RIDGE ESTIMATES THAT THERE IS POTENTIAL FOR AN ADDITIONAL 2,320 SINGLE FAMILY UNITS IN ITS URBAN AREA AND FOR AN ADDITIONAL 1,900 LARGE LOTS IN RURAL AREAS. IN ADDITION, THERE IS POTENTIAL FOR ABOUT 14,850 UNITS (MOSTLY SINGLE FAMILY) IN ITS URBAN RESERVE AREAS. ALTHOUGH THESE AREAS ARE NOT SERVICED.

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Based on information provided by the municipalities, the GVRD (including Pitt Meadows and Maple Ridge) has a potential additional short term supply of 45,100 single family lots and a potential long term supply of 59,500 lots.²

The region's net annual take-up rate is estimated at about 7,250 lots per year. Based on this take-up rate, the GVRD's potential short term single family lot supply should last about 6 years and its long term lot supply should last an additional 8 years, for a total of 14 years.

Within the GVRD, the supply outlook for single family lots is quite variable:

- the Burrard Peninsula municipalities (Vancouver, Burnaby, and New Westminster) have very little vacant single family land remaining. Most single family units built in these municipalities are replacement units.
- the North Shore has about a 40 year potential supply of single family lots. However, most of this vacant land is held by two large land owners (British Pacific Properties in West Vancouver and the District of North Vancouver) and only a small amount of land is likely to come on the market each year. If the lot development rate was accelerated it is likely that the North Shore's take-up rate would be much higher.
- the North-East Sector has about a 8 year supply of short term single family lots and a 10 year long term supply.
- Richmond has about a 13 year supply of single family land remaining under its current OCP.

² Short-term is defined as lands which are zoned and serviced or which could be readily re-zoned and serviced. Long-term is defined as lands which are designated for residential use, but are generally not serviced or zoned. Long-term also includes large lots in rural areas.

- the South of Fraser area (Surrey, Delta, White Rock) is likely to run out of single family lots in the next five years or so. Over the long term, this sub-region's ability to accommodate additional single family development will depend on whether Surrey extends its OCP's urban designation into lands which are currently designated suburban (large lots).
- the Township of Langley has a large supply of vacant single family residential land, although much of this is unserviced. As other sub-regions run out of vacant single family land, it is likely that Langley's annual take-up rate will increase.
- Maple Ridge and Pitt Meadows have about a three year short term supply of single family lots. Both municipalities have large potential supplies of long term family lots (about 24 years combined), but most of this land will require extensive servicing. The take-up rate of these municipalities will likely also increase.

The number of years of capacity by sub-region is based on a simple comparison of each sub-region's capacity and its recent growth rate. As some areas reach full capacity, demand will transfer to areas with capacity, thereby accelerating their rate of development.

3.3.2 Multi-Family Residential Capacity in the GVRD

The GVRD has a much larger potential supply of additional multi-family units than single family lots. Table 3 shows that the region's combined short term and long term additional multi-family unit capacity is approximately 207,400 units. (Some municipalities were not able to break down additional multi-family capacity into short term and long term categories). Based on a net annual take-up rate of 9,350 units per year, the region's potential multi-family unit supply should last about 23 years.

TABLE 3: GREATER VANCOUVER REGIONAL DISTRICT - ADDITIONAL MULTI-FAMILY HOUSING CAPACITY, 1990

MUNICIPALITY	1990 ESTIMATED ADDITIONAL MULTI-FAMILY UNIT CAPACITY (1)		ESTIMATED MF UNIT TAKE-UP RATE PER YEAR (2)	IMPLICATIONS FOR THE SUB-REGIONS
	SHORT TERM	LONG TERM		
VANCOUVER (3)	45,000	8,300		THIS SUB-REGION HAS ABOUT A 23 YEAR SUPPLY OF MULTI-FAMILY UNITS.
BURNABY (4)	9,300	0		
NEW WESTMINSTER (5)	12,000	0		
SUB-REGION	66,300	8,300	3,250	
WEST VANCOUVER (6)	0	NA		ABOUT A 9 YEAR SHORT TERM SUPPLY. PLUS 1 YEAR LONG TERM SUPPLY. WEST VANCOUVER HAS SOME MULTI-FAMILY POTENTIAL INCLUDED IN THE SINGLE FAMILY LONG TERM CAPACITY NUMBER
NORTH VANCOUVER CITY (7)	3,500	0		
NORTH VANCOUVER DISTRICT (8)	1,680	410		
SUB-REGION	5,180	410	550	
COQUITLAM (9)	5,100	NA		ABOUT A 11 YEAR SHORT TERM SUPPLY AND A 7 YEAR LONG TERM SUPPLY OF MULTI-FAMILY UNITS
PORT COQUITLAM (10)	1,650	3,600		
PORT MOODY (11)	2,500	2,500		
BELCARRA	0	0		
ANMORE	0	0		
SUB-REGION	9,250	6,100	850	
RICHMOND (12)	9,470	0		ABOUT A 7 YEAR SUPPLY
SUB-REGION	9,470	0	1,400	
DELTA (13)	11,000	0		ABOUT A 52 YEAR SUPPLY
SURREY (14)	72,300	0		
WHITE ROCK (15)	500	0		
SUB-REGION	83,800	0	1,600	
LANGLEY CITY (16)	0	5,750		ABOUT A 2 YEAR SHORT TERM SUPPLY AND A 13 YEAR LONG TERM SUPPLY.
LANGLEY TOWNSHIP (17)	1,900	4,600		
SUB-REGION	1,900	10,350	800	
PITT MEADOWS (18)	380	440		ABOUT A 12.5 YEAR SUPPLY.
MAPLE RIDGE (19)	5,500	0		
SUB-REGION	5,880	440	500	
TOTAL GVRD (INCLUDES MAPLE RIDGE AND PITT MEADOWS)	181,780	25,600	6,950	THERE IS ABOUT A 23 YEAR SUPPLY OF MULTI-FAMILY UNITS IN THE GVRD.

NOTES AND SOURCES:

- (1) SHORT TERM IS DEFINED AS LANDS WHICH ARE ZONED AND SERVICED OR WHICH COULD BE READILY REZONED AND SERVICED. LONG TERM REFERS TO LANDS WHICH ARE DESIGNATED FOR RESIDENTIAL USE, BUT ARE GENERALLY NOT SERVICED.
- (2) BASED ON CANADA MORTGAGE AND HOUSING CORPORATION MULTI-FAMILY UNIT STARTS AVERAGED OVER 1979 TO 1988.
65% OF GROSS STARTS IN VANCOUVER, BURNABY, AND NEW WESTMINSTER ARE NET NEW UNITS.

- (3) IN JUNE 1988 THE PLANNING DEPARTMENT ESTIMATED THERE WAS POTENTIAL FOR AN ADDITIONAL 37,500 NET NEW HOUSING UNITS BASED ON EXISTING RESIDENTIAL ZONING. THIS FIGURE INCLUDES SOME R.S. UNITS BUT IS MOSTLY MULTI-FAMILY UNITS. IN SEPTEMBER 1989 THE PLANNING DEPARTMENT ESTIMATED THAT THERE WAS POTENTIAL FOR ABOUT 10,300 MULTI-FAMILY UNITS IN COMMERCIAL ZONES. THESE ESTIMATES TOTAL ABOUT 47,800 UNITS. THE MAJORITY OF WHICH ARE MULTI-FAMILY UNITS. IF THIS TOTAL POTENTIAL IS ADJUSTED TO TAKE ACCOUNT OF THE NET TAKE-UP RATE IN THE SECOND HALF OF 1988 AND ALL OF 1989 (ABOUT 3,150 UNITS), THEN THE CITY HAS POTENTIAL FOR ABOUT AN ADDITIONAL 44,650 UNITS IN THE SHORT TERM. IN THE LONG TERM, THE PLANNING DEPARTMENT ESTIMATES THAT POTENTIAL RE-ZONING COULD ADD ABOUT 8,300 MULTI-FAMILY UNITS.
- (4) BURNABY'S OCP FORECASTS AN AVERAGE ANNUAL NET INCREASE OF ABOUT 1,000 DWELLING UNITS BETWEEN 1981 AND 2,001. WITH MULTI-FAMILY UNITS ACCOUNTING FOR ABOUT 75% OF THIS NET DWELLING UNIT GROWTH. ACCORDING TO THE OCP, BURNABY WILL HAVE REACHED 89% OF ITS DWELLING UNIT CAPACITY UNDER THIS OCP BY 2001. BASED ON THIS INFORMATION, IT IS ESTIMATED THAT BURNABY HAS A POTENTIAL ADDITIONAL MULTI-FAMILY UNIT SUPPLY OF ROUGHLY 9,300 MULTI-FAMILY UNITS UNDER ITS CURRENT OCP.
- (5) THE PLANNING DEPARTMENT ESTIMATES THAT THE CITY OF NEW WESTMINSTER HAS A SATURATION CAPACITY OF 68,982 HOUSING UNITS BASED ON EXISTING ZONING, BUT SUGGESTS THAT 50% OF THIS FIGURE IS MORE PROBABLE. IF EXISTING UNITS (22,647 AS OF DECEMBER 1989) ARE SUBTRACTED FROM THE 50% SATURATION CAPACITY (34,491), THIS LEAVES A RESIDUAL CAPACITY OF ABOUT 12,000 UNITS. MOST OF THESE UNITS WILL BE MULTI-FAMILY UNITS. THIS RESIDUAL CAPACITY DOES NOT INCLUDE POTENTIAL RE-ZONING.
- (6) AS OF MAY 1987, WEST VANCOUVER HAD CAPACITY FOR AN ADDITIONAL 3,000 TO 4,500 HOUSING UNITS ABOVE THE UPPER LEVELS HIGHWAY. WHILE IT IS PROBABLE THAT MOST OF THESE UNITS WILL BE SINGLE FAMILY UNITS, THERE MAY BE SOME MULTI-FAMILY DEVELOPMENT IN THIS AREA.
- (7) THE CITY OF NORTH VANCOUVER ESTIMATES THAT IT HAS CAPACITY FOR AN ADDITIONAL 3,500 MULTI-FAMILY UNITS.
- (8) BASED ON THE BACKGROUND REPORT OF THE DISTRICT OFFICIAL PLAN (FUTURE POPULATION AND HOUSING GROWTH #2C, MARCH 1989) IT IS ESTIMATED THAT THE WESTERN PART OF THE DISTRICT CAN ACCOMMODATE AN ADDITIONAL 1,700 TO 2,700 HOUSING UNITS. IT IS ASSUMED THAT ABOUT 50% OF THESE UNITS WILL BE MULTI-FAMILY UNITS (AVERAGE OF 1,100 UNITS). IN THE EASTERN PART OF THE MUNICIPALITY, THE SEYMOUR OCP HAS A TARGET OF 17,750 UNITS. IF EXISTING UNITS (7,340 AS OF 1988) ARE SUBTRACTED FROM THIS TARGET TOTAL, THERE IS IS POTENTIAL FOR ABOUT 10,410 ADDITIONAL UNITS IN SEYMOUR. HOWEVER, RECENT POLICY CHANGES HAVE REDUCED THIS TARGET BY ABOUT 3,070 UNITS. ACCORDING TO THE SEYMOUR OCP, 80% OF UNITS ARE TO BE GROUND-ORIENTED. IT IS ESTIMATED, THEREFORE, THAT THE SEYMOUR AREA HAS POTENTIAL FOR AN ADDITIONAL 1,058 SHORT TERM MULTI-FAMILY UNITS AND 410 LONG TERM MULTI-FAMILY UNITS. SUBTRACTING 1988 AND 1989 ESTIMATED STARTS (ABOUT 500) FROM THE DISTRICT'S TOTAL MULTI-FAMILY UNIT POTENTIAL YIELDS A CURRENT POTENTIAL OF ABOUT 1,658 SHORT TERM MULTI-FAMILY UNITS AND 410 LONG TERM MULTI-FAMILY UNITS.
- (9) THE DISTRICT OF COQUITLAM ESTIMATED IN 1986 THAT THERE WAS POTENTIAL FOR 4,000 APARTMENT UNITS IN THE TOWN CENTRE AREA. AN ADDITIONAL 1,100 MULTI-FAMILY UNITS WILL BE DEVELOPED IN THE NORTHWEST AREA. IN ADDITION, THERE IS INFILL AND REDEVELOPMENT POTENTIAL IN DEVELOPED AREAS FOR 1,000 MULTI-FAMILY UNITS, ALTHOUGH SOME OF THESE UNITS WILL BE REPLACEMENT UNITS. OVER THE LONG TERM, THE NORTHEAST AREA MAY PROVIDE ADDITIONAL MULTI-FAMILY UNIT SUPPLY, ALTHOUGH IT WILL BE PRIMARILY A SINGLE FAMILY RESIDENTIAL AREA.
- (10) ACCORDING TO THE PLANNING DEPARTMENT, THE CITY OF PORT COQUITLAM HAS POTENTIAL FOR ABOUT 1,520 MULTI-FAMILY UNITS IN THE SHORT TERM AND ABOUT 3,200 UNITS IN THE LONG TERM.
- (11) THE CITY OF PORT MOODY ESTIMATES THAT IT HAS A POTENTIAL SUPPLY OF 2,500 MULTI-FAMILY UNITS IN THE SHORT TERM AND 2,500 MULTI-FAMILY UNITS IN THE LONG TERM.

- (12) BASED ON RICHMOND'S OCP, THE PLANNING DEPARTMENT ESTIMATED IN 1989 THAT AN ADDITIONAL 5,010 MULTI-FAMILY UNITS COULD BE ACCOMMODATED BETWEEN 1990 AND 1994 AND 4,455 UNITS COULD BE DEVELOPED BETWEEN 1995 AND 1999 FOR A TOTAL POTENTIAL ADDITIONAL SUPPLY OF 9,465 MULTI-FAMILY UNITS.
- (13) BASED ON HOUSEHOLD PROJECTIONS PROVIDED BY THE DISTRICT OF DELTA, IT IS ESTIMATED THAT AN ADDITIONAL 11,118 MULTI-FAMILY HOUSING UNITS WILL BE DEVELOPED IN DELTA BETWEEN 1990 AND 2006. NO ESTIMATES ON DELTA'S SUPPLY CAPACITY UNDER THE CURRENT OCP IS AVAILABLE.
- (14) BASED ON THE CURRENT OCP, THE DISTRICT OF SURREY ESTIMATES IT HAS CAPACITY FOR AN ADDITIONAL 72,316 APARTMENT UNITS AS OF 1990.
- (15) WHITE ROCK IS IN THE PROCESS OF ADOPTING A NEW OCP, BUT THE NEW OCP WILL PROBABLY PROVIDE FOR SUFFICIENT MULTI-FAMILY UNIT POTENTIAL TO ACCOMMODATE ABOUT 200 PEOPLE PER YEAR. BASED ON THIS INFORMATION IT IS ASSUMED THAT WHITE ROCK HAS AN ADDITIONAL MULTI-FAMILY UNIT CAPACITY OF 100 UNITS PER YEAR OVER THE FIVE YEAR TIME SPAN OF ITS NEW OCP.
- (16) APPLICATIONS ON HAND WILL DEVELOP ALL OF THE CITY OF LANGLEY'S REMAINING VACANT MULTI-FAMILY RESIDENTIAL LAND. HOWEVER, THE CITY'S OCP PROVIDES FOR THE REDEVELOPMENT OF EXISTING SINGLE FAMILY HOUSING FOR MULTI-FAMILY HOUSING. BASED ON INFORMATION IN THE OCP, IT IS ESTIMATED THAT MULTI-FAMILY REDEVELOPMENT POTENTIAL TOTALS ABOUT 5,750 UNITS.
- (17) THE TOWNSHIP OF LANGLEY ESTIMATES THAT AS OF 1990 IT HAS A SHORT TERM POTENTIAL SUPPLY OF 1,915 MULTI-FAMILY UNITS AND A LONG TERM SUPPLY OF 4,602 MULTI-FAMILY UNITS.
- (18) AS OF NOVEMBER 1989, PITT MEADOWS ESTIMATES THAT IT HAS A POTENTIAL SHORT TERM SUPPLY OF 382 MULTI-FAMILY UNITS AND A POTENTIAL LONG TERM SUPPLY OF 440 MULTI-FAMILY UNITS.
- (19) THE PLANNING DEPARTMENT ESTIMATES THAT THERE IS POTENTIAL FOR AN ADDITIONAL 5,520 MULTI-FAMILY UNITS IN THE EXISTING URBAN AREA.

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By sub-region:

- the Burrard Peninsula has a large potential supply of multi-family units, but much of this supply is based on a saturation level of development (i.e. maximum build-out based on current zoning or likely re-zoning).
- the North Shore has about a 10 year potential supply of multi-family housing.
- the Northeast Sector has an 11 year potential short term supply of multi-family units and a 7 year long term supply.
- Richmond has an estimated seven year potential supply of multi-family units.
- the South of Fraser sub-region has a very large potential supply of additional multi-family units (over 80,000), primarily in Surrey.
- the Township of Langley and the City of Langley have a combined potential multi-family unit supply which should last for about 15 years.
- combined, Pitt Meadows and Maple Ridge have a potential 12.5 year supply of multi-family unit capacity.

3.3.3 Residential Capacity in the Fraser Valley

Table 4 provides estimates of potential additional single family and multi-family housing unit capacities and estimated take-up rates for four Fraser Valley municipalities: Mission, Abbotsford, Matsqui and Chilliwack.

TABLE 4: FRASER VALLEY MUNICIPALITIES - ADDITIONAL HOUSING CAPACITY, 1990

MUNICIPALITY	1990 ESTIMATED ADDITIONAL SINGLE FAMILY LOT CAPACITY (1)		ESTIMATED SF LOT TAKE-UP RATE PER YEAR (2)		1990 ESTIMATED ADDITIONAL MULTI-FAMILY UNIT CAPACITY (1)		ESTIMATED MF UNIT TAKE-UP RATE PER YEAR (2)		IMPLICATIONS
	SHORT TERM	LONG TERM			SHORT TERM	LONG TERM			
MISSION (3)	8,800	11,000	300		1,500	3,000	100		THERE IS A SHORT TERM SINGLE FAMILY LOT SUPPLY OF ABOUT 9.5 YEARS AND A LONG TERM SINGLE FAMILY LOT SUPPLY OF 14.5 YEARS.
MATSQUI (4)	3,100	3,300	600		3,200	2,000	500		
ABBOTSFORD (6)	500	2,700	150		700	4,000	200		ABBOTSFORD, MATSQUI, AND MISSION COMBINED HAVE 7 YEAR SHORT TERM MULTI-FAMILY UNIT SUPPLY 11 YEAR LONG TERM MULTI-FAMILY UNIT SUPPLY.
CHILLIWACK (8)	5,400	5,000	400		NA	NA	200		
TOTAL FRASER VALLEY	14,800	22,000	1,500		5,400	9,000	1,000		

NOTES AND SOURCES:

- (1) SHORT TERM IS DEFINED AS LANDS WHICH ARE ZONED AND SERVICED OR WHICH COULD BE READILY REZONED AND SERVICED. LONG TERM REFERS TO LANDS WHICH ARE DESIGNATED FOR RESIDENTIAL USE, BUT ARE GENERALLY NOT SERVICED.
- (2) BASED ON CANADA MORTGAGE AND HOUSING CORPORATION MULTI-FAMILY UNIT STARTS AVERAGED OVER 1980 TO 1988.
- (3) THE DISTRICT OF MISSION ESTIMATES THAT IT HAS POTENTIAL FOR 9,800 SHORT TERM SINGLE FAMILY UNITS (SERVICES TO URBAN AND RURAL STANDARDS) AND 11,000 LONG TERM SINGLE FAMILY UNITS. THERE IS ALSO POTENTIAL FOR 1,500 SHORT TERM MULTI-FAMILY UNITS AND 3,000 LONG TERM MULTI-FAMILY UNITS. IT IS POSSIBLE THAT LOT YIELDS MAY BE SLIGHTLY LESS THAN EXPECTED DUE TO ENVIRONMENTAL CONSTRAINTS.
- (4) THE DISTRICT OF MATSQUI ESTIMATES THAT IT HAS A POTENTIAL SUPPLY OF 3,100 SHORT TERM SINGLE FAMILY LOTS AND 3,300 LONG TERM SINGLE FAMILY LOTS. IT ALSO HAS POTENTIAL FOR 3,200 SHORT TERM MULTI-FAMILY UNITS AND 2,000 LONG TERM MULTI-FAMILY UNITS.
- (5) THE DISTRICT OF ABBOTSFORD HAS A POTENTIAL SUPPLY OF 500 SHORT TERM SINGLE FAMILY UNITS AND 2,700 LONG TERM SINGLE FAMILY UNITS. IN ADDITION, ABBOTSFORD HAS A POTENTIAL SUPPLY OF 700 SHORT TERM MULTI-FAMILY UNITS AND 4,000 LONG TERM MULTI-FAMILY UNITS.
- (6) THE DISTRICT OF CHILLIWACK ESTIMATES THAT AN ADDITIONAL 5,400 HOUSING UNITS COULD BE ACCOMMODATED IN THE DEVELOPED AREAS OF THE MUNICIPALITY. IN ADDITION, THE PROMONTORY AREA COULD ACCOMMODATE A MINIMUM OF 5,000 HOUSING UNITS, BUT MAJOR SERVICING IMPROVEMENTS ARE REQUIRED AFTER THE PROMONTORY IS DEVELOPED. THE RYDER LAKE AREA WILL PROBABLY BE DEVELOPED (IN ABOUT 15 TO 20 YEARS). THIS IS A VERY LARGE AREA WHICH COULD ACCOMMODATE SEVERAL THOUSAND HOUSING UNITS.

These four Fraser Valley municipalities have a combined potential short term supply of 14,600 single family lots which, at the combined annual take-up rate of 1,500 lots per year, should last about 9.5 years. The long term potential supply of single family residential land in these municipalities combined is estimated to accommodate 22,000 lots which, at a take-up rate of 1,500 lots per year should last for about 14.5 years. In addition to the potential short and long term supply identified in Table 4, the Ryder Lake area of Chilliwack has potential to accommodate several thousand lots in the long term.

There is a short and long term supply of 14,400 multi-family units in Mission, Abbotsford and Matsqui combined. The total estimated take-up rate in these municipalities is 1,050 units per year, so their supply should last for about 13.5 years. Chilliwack will also be able to accommodate some additional multi-family development. (Potential housing unit capacity information for Chilliwack has not been broken down into single family and multi-family categories, so all of Chilliwack's potential housing supply has been placed in the single family category.)

3.4 OUTLOOK

The "supply" of additional residential units in the GVRD is a fluid situation because policy decisions and market factors could alter the actual supply. Based on information available for this report, as of 1990 the GVRD's total potential supply of additional single family residential capacity will last another 14 years given a fairly conservative take-up rate of 7,250 lots per year (net), but the region's short term capacity could be used up in about six years. This declining supply will likely result in:

- higher prices for existing and new single family houses,
- more rapid single family residential development in municipalities such as Langley and Maple Ridge and the Fraser Valley,
- increased pressure to develop ALR lands particularly in municipalities such as Delta and Richmond, and
- increased pressure to develop areas which are not currently designated for development, including Bowen Island, Indian Reserves, and Indian Arm.

The GVRD has a potential additional supply of multi-family housing units which should last for another 23 years given a conservative take-up rate. The region's potential to accommodate multi-family residential development is not a problem, but communities' willingness to accept high density housing may limit the actual supply.

4.0 INDUSTRIAL SITUATION IN GREATER VANCOUVER

4.1 HISTORICAL TRENDS

In 1960, there was approximately 13,000 acres of available industrial land in the GVRD and in 1966 about 12,500 acres were identified as available.³ In 1981, a GVRD study estimated that the region had almost 8,000 acres of vacant industrial land (including farm land designated for industrial use).⁴ By 1984, another survey estimated that the GVRD had approximately 6,500 acres of vacant zoned or designated industrial land.⁵

If these inventories are comparable, an annual average of 271 acres of industrial land was absorbed in the GVRD between 1960 and 1984. It is important to note, however, that not all of the industrial land which was developed during this period was used for industrial purposes. Also, the annual take-up rate of industrial land for industrial purposes has fluctuated considerably with the region's economic cycles. For example, absorption of industrial land for immediate development in Greater Vancouver was estimated at 83 acres in 1986, 284 acres in 1987, 422 acres in 1988, and 550 acres in 1989.⁶

³ Space for Industry: Summary Report, GVRD Planning Department, 1971.

⁴ Greater Vancouver's Land Resource: Current Use and Land Supply, GVRD Planning Department, September 1982.

⁵ Lower Mainland Industrial Land Strategy, prepared for the Ministry of Industry and Small Business Development by Underwood McLellan Ltd., March 1984.

⁶ Greater Vancouver Real Estate Market, Colliers MaCaulay Nicolls Inc., December 1989.

4.2 LIVABLE REGION STRATEGY

Part Two of the GVRD's Livable Region Strategy was to promote a balance of jobs to population in each part of the region. The main aim of this part of the strategy was to reduce commuting travel, but it was also hoped that a more equitable sharing of industrial and commercial assessments among municipalities would result from managing job locations.

The 1975 Livable Region Strategy reported that the region had about 12,000 acres of vacant land zoned for industrial use outside of the ALR. The strategy forecast an industrial land absorption rate of 250 acres per year. Based on this forecast, the region had an almost 50 year supply of industrial land in 1975 and the strategy did not anticipate any limitations on the region's industrial supply. The challenge of the strategy was to see that "industry goes into the right places" and it was suggested that various incentives and methods be used to attract industry such as organized industrial parks and improved rail and road connections between industrial areas.

4.3 THE CURRENT SITUATION

This section compares estimates of the region's vacant industrial land supply with estimated future take-up rates.

4.3.1 Industrial Land Supply in the GVRD

Based on estimates supplied by the municipalities, the GVRD (including Pitt Meadows and Maple Ridge) has about 5,400 acres of vacant short term industrial land⁷ and about 5,500 acres of vacant long term industrial land (Table 5), although it is estimated that at least 1,000 acres of the long term supply are in the Agricultural Land Reserve.

Various studies in the last 15 years or so have attempted to forecast the region's demand for new industrial land. These forecasts have ranged between 250 to 425 acres per year. Based on recent absorption experience (about 550 acres in 1989) and continued strong economic growth in the region, it is expected that between 400 to 500 acres per year of vacant industrial land will be absorbed in the next few years in the GVRD. It is difficult to forecast long term absorption because it is difficult to predict how the region's economy will perform over the long term and because the region's dwindling supply of good quality, centrally located vacant industrial land may influence long term absorption.

Using an absorption rate of 400 to 500 acres per year, the GVRD's short term vacant industrial land supply (5,300 acres) should last for 10.5 to 13.0 years and the region's long term vacant industrial land supply (5,700 acres) should last for an additional 11 to 14 years.

⁷ The term industrial land refers to lands which are within a zone or OCP designation defined as industrial by the municipalities. It is noted that the definition of industrial use varies by municipality. Also, in general terms, industrial land use has taken on a broader meaning in recent years to include more office and retail space.

TABLE 5: GREATER VANCOUVER REGIONAL DISTRICT - VACANT INDUSTRIAL LAND (ACRES), 1990

MUNICIPALITY	1990 VACANT (1) INDUSTRIAL LAND		ESTIMATED TAKE-UP RATE PER YEAR (2)	IMPLICATIONS
	SHORT TERM	LONG TERM		
VANCOUVER (3)	100	0		
BURNABY (4)	1,000	0		
NEW WESTMINSTER (5)	100	0		
SUB-REGION	1,200	0		
WEST VANCOUVER	0	0		
NORTH VANCOUVER CITY (6)	15	65		
NORTH VANCOUVER DISTRICT (7)	240	NA		
SUB-REGION	255	65		
COQUITLAM (8)	300	80		
PORT COQUITLAM (9)	0	270		
PORT MOODY (10)	0	0		
BELCARRA	0	0		
ANMORE	0	0		
SUB-REGION	300	350		
RICHMOND (11)	365	1,445		
SUB-REGION	365	1,445		
DELTA (12)	800	700		
SURREY (13)	1,300	600		
WHITE ROCK	0	0		
SUB-REGION	2,100	1,300		
LANGLEY CITY (14)	60	0		
LANGLEY TOWNSHIP (15)	790	920		
SUB-REGION	850	920		
PITT MEADOWS (16)	0	200		
MAPLE RIDGE (17)	190	1,400		
SUB-REGION	190	1,600		
TOTAL GVRD (INCLUDES MAPLE RIDGE AND PITT MEADOWS)	5,250	5,660	400 TO 500	THE REGION HAS A 10.5 TO 13 YEAR SUPPLY OF SHORT TERM INDUSTRIAL LAND AND AN 11 TO 14 YEAR LONG TERM SUPPLY

NOTES AND SOURCES

- (1) SHORT TERM IS DEFINED AS LANDS WHICH ARE ZONED AND SERVICED OR WHICH COULD BE READILY REZONED AND SERVICED. LONG TERM REFERS TO LANDS WHICH ARE DESIGNATED FOR INDUSTRIAL USE, BUT ARE GENERALLY NOT SERVICED.
- (2) BASED ON INFORMATION FROM REALTORS AND HISTORIC TAKE-UP RATES. TAKE-UP IS DEFINED AS OCCURRING WHEN DEVELOPMENT STARTS.

- (3) THE CITY HAS NO RECENT ESTIMATE OF VACANT INDUSTRIAL LAND, BUT IN 1984, IT WAS ESTIMATED THAT THE CITY HAD 214 ACRES OF VACANT INDUSTRIAL LAND (SOURCE: INDUSTRY IN VANCOUVER: BACKGROUND REPORT, JUNE 12, 1989). IT IS PROBABLE THAT SOME OF THIS LAND HAS BEEN DEVELOPED SINCE 1984 AND MUCH OF THE REMAINING VACANT INDUSTRIAL LAND IS UNSUITABLE FOR DEVELOPMENT BECAUSE OF ITS SIZE, SHAPE, SOIL OR SLOPE CONDITIONS. ACCORDING TO THE PLANNING DEPARTMENT, IT IS PROBABLE THAT THE AMOUNT OF LAND DESIGNATED FOR INDUSTRIAL USE WILL BE REDUCED. THE PLANNING DEPARTMENT EXPECTS TO RECOMMEND THE REMOVAL OF ABOUT 400 ACRES FROM INDUSTRIAL ZONING IN THE SHORT TERM AND IS STUDYING ADDITIONAL SURPLUS INDUSTRIAL LANDS (UP TO 400 ACRES) THAT COULD BE RELEASED WITHIN FIVE YEARS.
- (4) BASED ON A JANUARY 1990 UPDATE OF THE MUNICIPALITY'S INDUSTRIAL LAND INVENTORY (1,150 ACRES IN 1986), THERE ARE APPROXIMATELY 1,003 ACRES OF AVAILABLE INDUSTRIAL LAND IN BURNABY. THE INVENTORY INCLUDES VACANT SITES ZONED FOR INDUSTRIAL USE, UNDER-UTILIZED SITES, AND POTENTIAL REDEVELOPMENT SITES.
- (5) ACCORDING TO THE MUNICIPALITY, TOTAL VACANT LAND IN INDUSTRIAL ZONING DISTRICTS AS OF 1986 WAS 100 ACRES.
- (6) BASED ON THE DRAFT INDUSTRIAL LAND INVENTORY PREPARED FOR THE NORTH SHORE ECONOMIC DEVELOPMENT COMMISSION THERE ARE 78.5 VACANT ACRES OF INDUSTRIALLY DESIGNATED LAND IN THE CITY OF NORTH VANCOUVER AS OF 1990. THIS TOTAL INCLUDES THE 63 ACRE FULLERTON FILL SITE WHICH IS ZONED FOR INDUSTRIAL USE, BUT IS DESIGNATED AS A SPECIAL STUDY AREA IN THE CITY'S OCP.
- (7) ACCORDING TO THE NORTH SHORE ECONOMIC DEVELOPMENT COMMISSION'S DRAFT INDUSTRIAL LAND INVENTORY, THERE ARE 237 VACANT ACRES OF ZONED OR DESIGNATED INDUSTRIAL LAND IN THE DISTRICT OF NORTH VANCOUVER. SOME OF THESE LANDS ARE NOT SERVICED AND SOME ARE DESIGNATED FOR COMMERCIAL AND COMMUNITY USES IN THE MAPLEWOOD OCP. THIS INVENTORY DOES NOT INCLUDE UNDER-DEVELOPED LAND OWNED BY B. C. RAIL.
- (8) ACCORDING TO THE MUNICIPALITY, THERE ARE 296 ACRES OF VACANT INDUSTRIAL LAND IN COQUITLAM, PLUS AN 80 ACRE LANDFILL SITE WHICH IS DESIGNATED FOR LONG TERM INDUSTRIAL USE.
- (9) ACCORDING TO THE MUNICIPALITY, THE ONLY SIGNIFICANT VACANT INDUSTRIAL LAND REMAINING IN PORT COQUITLAM IS THE 270 ACRE DOMINION TRIANGLE PROPERTY. THIS LAND IS DESIGNATED FOR INDUSTRIAL USE IN THE OCP AND IS NOT SERVICED. THE PROPERTY IS IN THE ALR, BUT APPLICATION HAS BEEN MADE TO REMOVE IT FROM THE RESERVE.
- (10) PORT MOODY HAS NO INFORMATION ON ITS VACANT INDUSTRIAL LAND. HOWEVER, THERE IS PROBABLY ONLY A SMALL AMOUNT OF VACANT INDUSTRIAL LAND IN PORT MOODY.
- (11) THE MUNICIPALITY ESTIMATES THAT AS OF DECEMBER 1988, THERE WERE 1,809 ACRES OF VACANT INDUSTRIAL LAND IN RICHMOND, INCLUDING 366 ACRES WHICH ARE SERVICED AND 1,443 ACRES WHICH ARE NOT SERVICED.
- (12) THE MUNICIPALITY ESTIMATES THAT AS OF 1990 THERE ARE 1,943 ACRES OF AVAILABLE INDUSTRIAL LAND IN DELTA WHICH INCLUDES 711 ACRES IN THE ALR. THE MUNICIPALITY HAS IDENTIFIED APPROXIMATELY 395 ACRES IN THE RIVER ROAD EAST AREA WHICH ARE EITHER PROPOSED FOR FUTURE PARK USE OR HAVE LIMITED POTENTIAL FOR INDUSTRIAL USE. THE INVENTORY DOES NOT INCLUDE BURNS BOG WHICH MAY EVENTUALLY BE PARTIALLY USED FOR INDUSTRIAL DEVELOPMENT.
- (13) SURREY DOES NOT HAVE A CURRENT INVENTORY OF ITS VACANT INDUSTRIAL LAND, BUT THE BUSINESS AND COMMUNITY DEVELOPMENT OFFICE ESTIMATES THAT THERE ARE ABOUT 1,300 ACRES OF VACANT INDUSTRIAL LAND IN THE NEWTON, SOUTH WESTMINSTER, CLOVERDALE, AND PORT KILLS AREAS. THERE ARE ALSO AN ESTIMATED 600 ACRES OF LAND IN THE CAMPBELL HEIGHTS AREA WHICH ARE DESIGNATED FOR LONG TERM INDUSTRIAL USE, BUT ARE NOT SERVICED.
- (14) ACCORDING TO THE MUNICIPALITY, AS OF 1990 THERE ARE 60 ACRES OF VACANT INDUSTRIAL LAND, EITHER ZONED OR DESIGNATED, IN THE CITY OF LANGLEY.

- (15) THE MUNICIPALITY ESTIMATES THAT AS OF DECEMBER 1989 THE TOWNSHIP OF LANGLEY HAD 787 ACRES OF VACANT SHORT TERM INDUSTRIAL LAND AND AN ADDITIONAL 918 ACRES OF VACANT INDUSTRIAL LAND IN RESERVE WHICH IS DESIGNATED FOR INDUSTRIAL USE, BUT NOT SERVICED.
- (16) AS OF 1990, THE MUNICIPALITY ESTIMATES THERE ARE 200 ACRES OF VACANT INDUSTRIAL LAND IN PITT MEADOWS. THIS LAND IS DESIGNATED FOR INDUSTRIAL USE, BUT IS NOT ZONED OR SERVICED.
- (17) ACCORDING TO THE MUNICIPALITY, THERE ARE ABOUT 190 ACRES OF VACANT INDUSTRIAL LAND IN MAPLE RIDGE'S EXISTING INDUSTRIAL AREAS AND 1,400 ACRES OF UNSERVICED LAND IN THE MUNICIPALITY'S INDUSTRIAL RESERVE.

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4.3.2 Industrial Land Supply in the Fraser Valley

Table 6 shows that Mission, Matsqui, Abbotsford, and Chilliwack combined have a total short and long term supply of vacant industrial land of about 2,300 acres, although it is estimated that about 1,000 acres of the long term supply are in the Agricultural Land Reserve. The combined annual absorption rate is estimated at about 110 acres per year. At this rate of take-up, the Fraser Valley's industrial land supply should last for about 20 years.

TABLE 6: FRASER VALLEY MUNICIPALITIES - VACANT INDUSTRIAL LAND (ACRES), 1990

MUNICIPALITY	1990 VACANT (1) INDUSTRIAL LAND		ESTIMATED TAKE-UP RATE PER YEAR (2)	IMPLICATIONS
	SHORT TERM	LONG TERM		
MISSION (3)	250	250	30	
MATSQUI (4)	480	975	40	
ABBOTSFORD (5)	50	0	40	
CHILLIWACK (6)	250	0	2	
TOTAL FRASER VALLEY	1,030	1,225	112	9 YEAR SHORT TERM INDUSTRIAL LAND SUPPLY. PLUS AN 11 YEAR SUPPLY OF LONG TERM INDUSTRIAL LAND

NOTES AND SOURCES

- (1) SHORT TERM IS DEFINED AS LANDS WHICH ARE ZONED AND SERVICED OR WHICH COULD BE READILY REZONED AND SERVICED. LONG TERM REFERS TO LANDS WHICH ARE DESIGNATED FOR INDUSTRIAL USE, BUT ARE NOT GENERALLY SERVICED. SOME MUNICIPALITIES WERE NOT ABLE TO PROVIDE A SHORT TERM/LONG TERM BREAKDOWN, SO ALL OF THEIR VACANT INDUSTRIAL LAND HAS BEEN PUT IN THE SHORT TERM CATEGORY.
- (2) BASED ON ESTIMATES PROVIDED BY MUNICIPALITIES. TAKE-UP IS DEFINED AS OCCURRING WHEN DEVELOPMENT STARTS.
- (3) THE MUNICIPALITY ESTIMATES THAT THERE ARE ABOUT 250 ACRES OF SHORT TERM VACANT INDUSTRIAL LAND AND 250 ACRES OF VACANT LONG TERM INDUSTRIAL LAND.
- (4) ACCORDING TO THE MUNICIPALITY, THERE ARE ABOUT 600 ACRES OF LAND DESIGNATED FOR INDUSTRIAL USE IN THE CLEARBROOK AREA OF WHICH ABOUT ONE FIFTH IS DEVELOPED. THEREFORE, THERE ARE ABOUT 480 ACRES OF VACANT INDUSTRIAL LAND IN CLEARBROOK. SOME OF THIS LAND IS IN THE ALR AND HAS ENVIRONMENTAL PROBLEMS WHICH WILL LIMIT THE AMOUNT OF LAND AVAILABLE FOR INDUSTRIAL DEVELOPMENT. MATSQUI ALSO HAS A LONG TERM INDUSTRIAL RESERVE OF 975 ACRES LOCATED NORTH OF THE ABBOTSFORD AIRPORT. ALL OF THIS LAND IS IN THE ALR.
- (5) THE MUNICIPALITY ESTIMATES THAT THERE ARE ABOUT 50 ACRES OF VACANT, SERVICED, ZONED INDUSTRIAL LAND REMAINING IN ABBOTSFORD AS OF 1990.
- (6) AS OF 1989, THE MUNICIPALITY ESTIMATES THAT THERE WERE 256 ACRES OF VACANT INDUSTRIALLY DESIGNATED LAND IN CHILLIWACK.

4.4 OUTLOOK

Although the GVRD appears to have a large supply of vacant industrial land which should last for another 20 to 25 years, the central municipalities have relatively little good quality, vacant industrial land remaining for development. Vancouver, New Westminster, and the North Shore have only small amounts of vacant industrial land which will probably be used up in the 1990s. It is also possible that at least portions of these remaining vacant lands could be converted to other uses. The process of converting industrial lands to other uses has been going on for about 20 years or so, particularly in attractive waterfront areas (for example, the south and north shores of False Creek in Vancouver, Westminster Quay in New Westminster, and Lonsdale Quay in North Vancouver). The City of Vancouver estimates that its total supply of industrial land has been reduced by about 25% since the late 1960s, while the City of New Westminster estimates it lost 151 acres of industrially zoned land from 1970 to 1988. This process of industrial land conversion in the central municipalities is likely to continue. For example, the City of Vancouver Planning Department has identified about 400 acres of its 2,000 acres of industrially zoned land as lands which could be converted to other uses.

The municipalities of Burnaby, Richmond, Delta, Coquitlam, and Port Coquitlam have larger amounts of vacant industrial land, but the best lands in these municipalities will probably be developed within the next few years leaving only small fragmented parcels, lands in the ALR, or lands controlled by the Federal Government (i.e. Airport and Fraser Port) remaining. Parts of Surrey (e.g. Newton) also have little remaining vacant industrial land.

The declining supply of good quality, centrally located, vacant industrial land is resulting in several trends:

- redevelopment and intensification of existing industrial land (e.g. the South Westminster area of Surrey will probably be redeveloped in the next decade).

- increasing industrial development activity in outlying municipalities of the GVRD and in the Fraser Valley. However, some of the vacant industrially designated land in these municipalities is not prime industrial land. Large portions of the industrially designated lands in these municipalities are unserviced, are in remote locations with currently difficult road access, are in the ALR, or have some type of environmental constraints, and are, therefore, not readily available for industrial development.

- export of industrial development potential to places like the B.C. Interior or Washington State as the Lower Mainland's prime industrial land is used up, as housing costs continue to rise in the Lower Mainland, and as inter-regional transportation improves.

5.0 OTHER LAND SUPPLY ISSUES

5.1 THEORETICAL VERSUS EFFECTIVE CAPACITY

The residential land supply estimates used in this report are based on current planning and zoning designations, so they do not take into account an emerging land supply issue. Recent experiences in Richmond (Terra Nova), Delta (TDL), and North Vancouver (Inter-River) demonstrate that there is community resistance to the development of lands that have come to be regarded as important open spaces, notwithstanding planning designations. There are likely to be other sites in the Lower Mainland that are included in the "paper" inventory but that may not be approved for development.

Another issue is the distinction between the true usable inventory and the capacity based on designations. Local soil conditions, land ownership or assembly problems, existing use patterns, or locational (i.e. marketability) problems tend to result in an effective land supply that is lower than theoretical land supply. Taking these factors into account would likely reduce the number of years of remaining capacity in each category of the inventory.

5.2 COMMERCIAL DEVELOPMENT CAPACITY

The region appears to have no significant constraints on its commercial development capacity. Many commercial areas are zoned to allow redevelopment at higher densities and commercial use (like multi-family use) frequently involves redevelopment, unlike single family residential and industrial use which involve the development of vacant land.

5.3 OPEN SPACE

The region has a perceived open space pattern that is different than the "official" network of dedicated parks.

There are forested lands and agricultural lands (including some no longer farmed) that many people regard as important open spaces, even though they are not officially recognized as such.

As the region develops, there is likely to be increasing pressure to protect more lands as open space.

5.4 SPECIAL LAND USES

The overview in this report deals only in broad categories. This broad treatment provides a general outlook but it does not address potentially more severe constraints on specialized uses. For example:

- the region's waterfront industrial land situation may be more critical than the total situation. Conversion of industrial land to other uses has been most rapid on waterfront lands (e.g. False Creek, south shore of Vancouver, New Westminster).
- the region's supply of heavy industrial land may also be more restricted than implied by the overview. While the rate of heavy industrial development is slow and there may be no desire to see additional heavy industrial development in the region, the issue is worth looking at if the region wants to maintain its economic diversity.

6.0 CONCLUSIONS

The 1975 Livable Region Strategy acknowledged that the region had a limited land supply and it proposed several strategies to encourage infill and more intensive land use. However, in 1975 the GVRD appeared to have a sufficient supply of residential and industrial land and, as a result, the strategies were regarded as "good planning", but not necessarily adopted as essential measures to deal with a critical problem. The economic recession of the mid-1980s perhaps contributed to the perception that land supply was not a major problem.

In the past 15 years, though, the GVRD has used a large share of its developable land. More importantly, much of the readily developable (i.e. zoned, accessible, serviceable, centrally located) land has been developed. Supply is lower at a time when the region appears to be facing an expansionary decade.

Land supply will be one of the critical land use planning and financial issues facing the region during the next 10 to 15 years. The region will face these pressures:

- Prices will continue to rise for residential and industrial land. Without significant changes in policy, residential and industrial land supplies are basically fixed. If these supplies continue to be taken up at rapid rates, diminishing supply means increasing prices, particularly for the most desirable parts of the region.
- The land supplies identified as "long term" will have to be brought into production. The region's short term single family residential land and short term industrial land supplies will probably be used up by the year 2000. It will be essential to bring long term supplies into production, but in most cases, these lands require major servicing expenditures.
- A larger share of total Lower Mainland development activity will occur in the Fraser Valley communities east of the GVRD. These communities will experience tremendous development pressures, resulting in rapid growth, significant character changes, and major capital expenditures. The "regional" strategy (particularly for transportation planning, town centres policies, and

residential growth planning) will have to become truly regional in scope.

- As readily developable land is used up, there will be increasing pressure to develop ALR lands. There are some lands that, while in the ALR, are probably more readily serviceable and accessible and, therefore, more attractive to develop in market terms than some long term reserves which are actually designated for development.
- There will be advocates for capacity reductions just at the time when the region will have the greatest need for more capacity. Community concerns about redevelopment (eliminating affordable units), about the conversion of open space to urban use, and about the effects of growth will lead to demands to reduce development capacities in some areas.

The purpose of this analysis has been to scope out the region's land supply situation and to outline the implications for the Livable Region Strategy. The following recommendations are offered for discussion purposes and are not meant to be detailed prescriptions:

1. The process of preparing this analysis has demonstrated that there is no comprehensive, consistent inventory of the region's land supply available. The region needs a systematic inventory which regularly monitors the region's land supply and the take-up rate, so that we know where the region's land supply stands.
2. The land supply problem will be a significant issue and constraint on the region's development pattern in the next decade. In the absence of an effort to control demand, there are two main approaches to dealing with the region's land supply problem: finding ways to expand supply and/or ways to increase the intensity of land use.

There are a variety of ways to "increase supply". The region could undertake a careful scrutiny and analysis of infill opportunities within already developed areas to find lands which may have more development potential than they are currently designated for (e.g. under-used government lands, under-used

industrial land, and parking areas, although using industrial land for other purposes may exacerbate the industrial land supply situation). Supply could also be increased by designating other lands for development which, while physically capable of supporting development, have been regarded as inappropriate for development for various reasons (e.g. agricultural lands). In identifying land supplies, the Livable Region Strategy can maintain the status quo or it can be bolder and examine whether these types of lands should be brought into the land supply inventory.

A second approach to the problem of diminishing residential and industrial land supplies is to increase the density of land use by using such measures as reducing the proportion of residential land used for single family housing, decreasing single family housing lot sizes, and increasing the density of industrial land use.

Some densification will happen as a result of market forces. For example, while some people may prefer single family housing they may choose to live in multi-family housing because it is what they can afford or they may choose multi-family housing to reduce their commuting time. In the face of rising industrial land values, users might find it cheaper to develop multi-storey buildings than to purchase large sites for single storey buildings.

To encourage densification, municipalities can take the passive approach making sure that regulations allow higher densities (e.g. reducing minimum lot sizes and increasing allowable FSRs in industrial zones) or they can take a more active approach using regulations to affect the nature of development (reducing the amount of land zoned for single family residential use is an extreme example).

3. An increasing proportion of the region's residential and industrial development will occur outside of the GVRD. Planning for land use, transportation and servicing and monitoring of development activity and land supplies should encompass the entire metropolitan region, not just the GVRD.

4. It is likely that the region will have to access land reserves designated for long term development by the end of the 1990s. These land reserves are not just incremental extensions of developed areas and will require major servicing expenditures to bring them into production. To focus development on these land reserves rather than other areas (such as ALR lands), the region must ensure that planning and capital expenditure budgeting is done in advance of need. The current Livable Region Strategy does not address financial issues, but the next version has to confront financial issues.
5. As residential land supplies decrease (particularly for single family housing) and housing prices rise, the issue of affordability will become more difficult. Ultimately, the availability of affordable housing will influence the availability of labour, the load on the region's transportation system, and the geographic distribution of socio-economic groups (i.e. who lives where in the region). It is likely that government will have a stronger presence in the housing market because of the affordability problem. For example, solutions to the affordability problem may be found in encouraging higher density family oriented housing and encouraging a larger share of affordable units in multi-family housing developments. Besides addressing the typical planning issues of residential densities and geographic distribution of land uses, the Livable Region Strategy should also address housing prices and tenure issues.

APPENDIX A

SINGLE FAMILY AND MULTI-FAMILY HOUSING UNIT STARTS

APPENDIX A: RESIDENTIAL STARTS FOR THE VANCOUVER LOWER MAINLAND, 1979 - 1989

SINGLE FAMILY	AREA	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	AVERAGE BETWEEN 1979-1989 (1)
	ANMORE	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	5	N/A
	BELCARRA	N/A	5	3	6	10	5	7	8	4	7	7	6
	BURNABY	319	376	250	104	356	292	285	402	400	559	505	385
	COQUITLAM	723	1,009	343	242	635	320	370	524	800	586	616	617
	DELTA	746	1,052	558	184	294	218	332	337	475	577	720	549
	GREATER VAN. SUB. DIV. A	25	37	17	39	22	34	14	19	20	8	47	28
	INDIAN RESERVES	14	8	0	1	2	2	4	10	18	12	45	12
	LANGLEY CITY	203	177	35	30	30	20	31	21	59	151	56	81
	LANGLEY DISTRICT	388	809	465	286	669	382	577	546	739	639	525	603
	LION'S BAY VILLAGE	17	21	9	3	5	8	6	11	16	20	13	13
	MAPLE RIDGE	140	334	175	79	232	231	613	602	724	538	542	421
	NEW WESTMINSTER	20	39	28	10	64	54	17	34	72	70	33	44
	NORTH VANCOUVER CITY	61	43	21	17	21	16	56	101	81	66	64	55
	NORTH VANCOUVER DISTRICT	323	392	199	48	298	288	403	330	317	314	205	312
	PITT MEADOWS	100	40	79	62	80	35	50	81	114	120	231	99
	PORT COQUITLAM	284	254	82	43	186	46	84	262	350	377	424	239
	PORT MOODY	114	196	52	8	20	25	123	64	79	91	141	91
	RICHMOND	991	1,335	365	98	460	349	547	677	564	721	783	689
	SURREY	2,168	2,305	1,576	841	2,233	1,058	1,745	2,399	2,589	2,823	3,440	2,318
	UNIVERSITY ENDOWMENT LANDS	0	0	0	0	0	0	0	0	0	0	0	0
	VANCOUVER	670	804	572	330	832	730	867	902	1,158	1,306	1,559	973
	WEST VANCOUVER	154	160	134	33	87	76	116	168	169	254	224	158
	WHITE ROCK	43	24	47	18	46	25	71	70	70	48	60	52
	TOTAL VANCOUVER METRO	7,503	9,420	5,010	2,482	6,582	4,214	6,318	7,568	8,818	9,287	10,245	7,745
	CHILLIWACK					207	108	172	231	281	282	445	247
	MATSQUI					425	255	279	303	764	900	722	521
	ABBOTSFORD					124	75	112	178	169	172	158	141
	MISSION					138	97	96	75	132	156	266	137
	TOTAL FRASER VALLEY					894	535	659	787	1,346	1,510	1,591	1,046
	TOTAL LOWER MAINLAND					7,476	4,749	6,977	8,355	10,164	10,797	11,836	8,622

MULTI-FAMILY

AREA	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	AVERAGE BETWEEN 1979-1989 (1)
ANMORE	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0	N/A
BELCARRA	N/A	2	0	0	0	0	0	0	0	0	0	0
BURNABY	539	1 358	1 853	927	1 069	741	560	354	936	530	1 124	999
COQUITLAM	447	131	520	994	382	58	190	223	450	489	735	462
DELTA	350	26	411	185	74	59	140	36	412	438	202	233
GREATER VAN. SUB. DIV. A	0	2	0	0	19	0	0	0	0	0	0	2
INDIAN RESERVES	0	0	0	0	14	0	0	0	0	0	5	2
LANGLEY CITY	2	28	242	28	180	43	28	91	155	322	367	149
LANGLEY DISTRICT	28	61	273	115	0	69	54	110	44	206	480	144
LION'S BAY VILLAGE	0	0	0	4	0	-	0	0	0	0	0	0
MAPLE RIDGE	14	35	257	74	120	20	26	103	451	104	413	162
NEW WESTMINSTER	29	262	277	207	19	418	452	368	354	393	1 003	378
NORTH VANCOUVER CITY	157	456	194	184	142	197	234	272	323	98	339	260
NORTH VANCOUVER DISTRICT	0	115	39	60	19	239	147	144	135	424	113	144
PITT MEADOWS	74	48	323	195	30	0	2	0	39	40	127	88
PORT COQUITLAM	48	77	147	181	54	2	26	26	183	279	169	119
PORT MOODY	108	90	90	54	70	8	13	10	17	0	112	57
RICHMOND	882	505	1 262	1 017	1 076	414	372	821	1 122	1 387	1 889	1 075
SURREY	748	1 730	1 421	1 296	814	758	416	821	1 056	965	1 399	1 142
UNIVERSITY ENDOWMENT LANDS	0	0	0	0	0	0	0	0	0	0	0	0
VANCOUVER	1 826	2 161	2 666	1 973	1 599	2 154	2 132	2 343	3 005	2 519	2 889	2 527
WEST VANCOUVER	28	169	51	22	16	88	74	101	209	145	77	98
WHITE ROCK	44	104	191	118	37	201	131	187	151	275	146	159
TOTAL VANCOUVER METRO:	5 324	7 360	10 217	7 634	5 734	5 469	4 997	6 010	9 042	8 614	11 589	8 199
CHILLIWACK												
MATSQUI					2	66	87	190	210	171	214	94
ABBOTSFORD					130	220	315	405	891	815	498	327
MISSION					0	6	4	0	24	198	200	43
TOTAL FRASER VALLEY:					34	6	2	23	53	42	98	26
					166	298	408	618	1 178	1 226	1 010	490
TOTAL LOWER MAINLAND:					5 900	5 767	5 405	6 628	10 220	9 840	12 599	5 636

(1) FOR FRASER VALLEY MUNICIPALITIES AND TOTAL LOWER MAINLAND, THE AVERAGE STARTS IS BASED ON THE PERIOD 1983 TO 1989, BECAUSE 1979 TO 1982 DATA ARE NOT AVAILABLE FOR FRASER VALLEY MUNICIPALITIES.